Step-by-Step Instructions on Using the Plan Builder.

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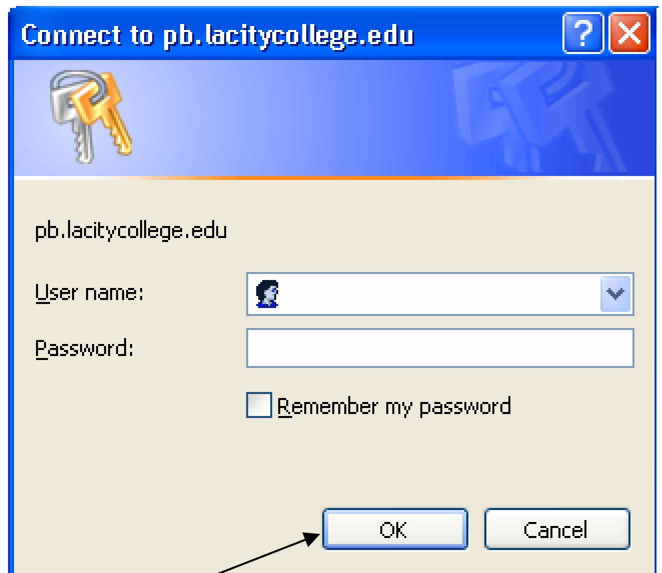
SECTION 1: How to Log into the System

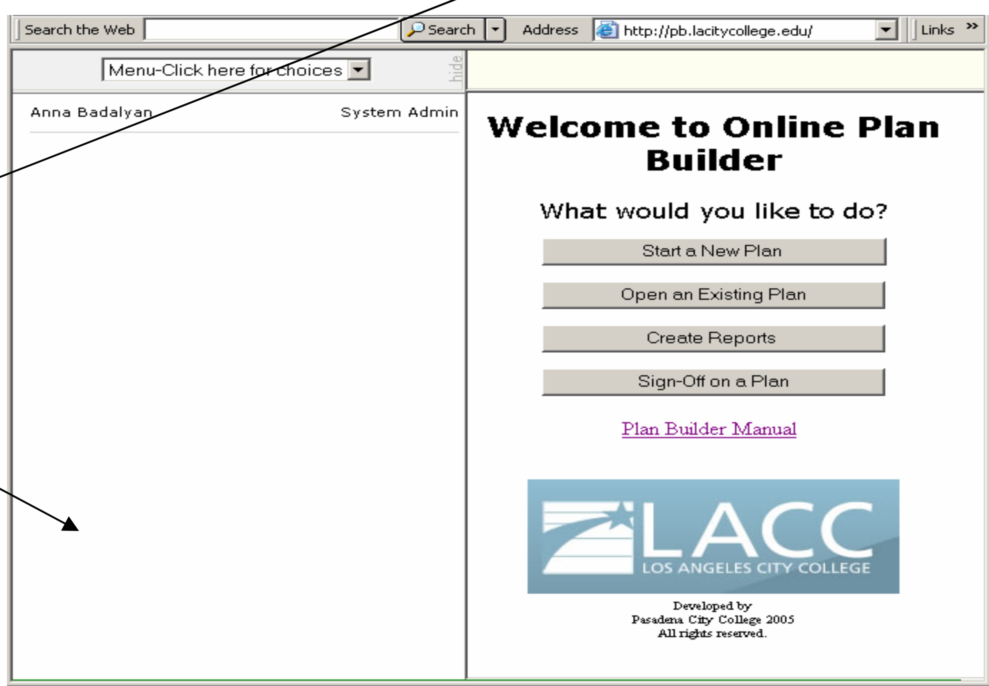
Sorry,
PC & Internet Explorer Only
But it is Available from Home!

Go to
http://pb.lacitycollege.edu/

For **user name & password** use your LACC email account user name & password.



After entering your user name and password above, click ok to get to this page.



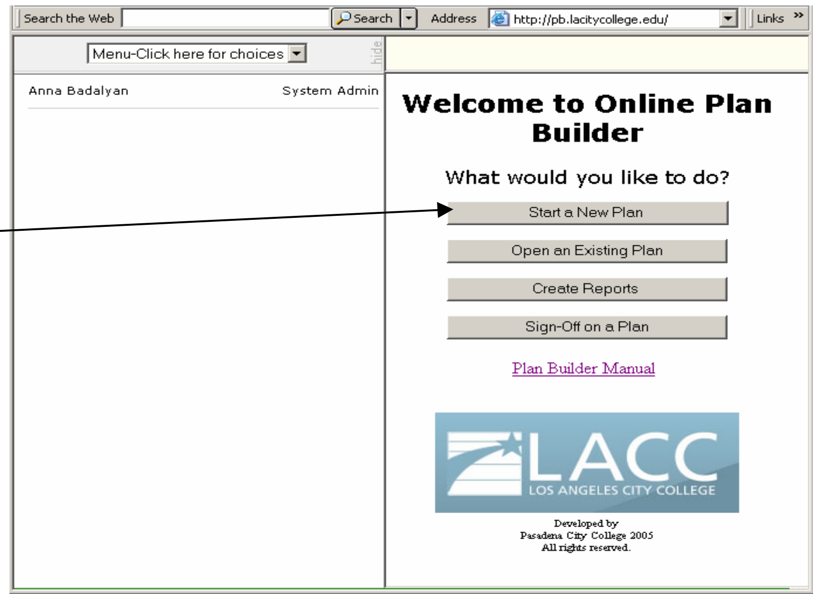
SECTION 2: Create a New Empty Plan

Create a New Plan

Step 1

If you do not have a plan and want to create a new one, click on “Start a New Plan”

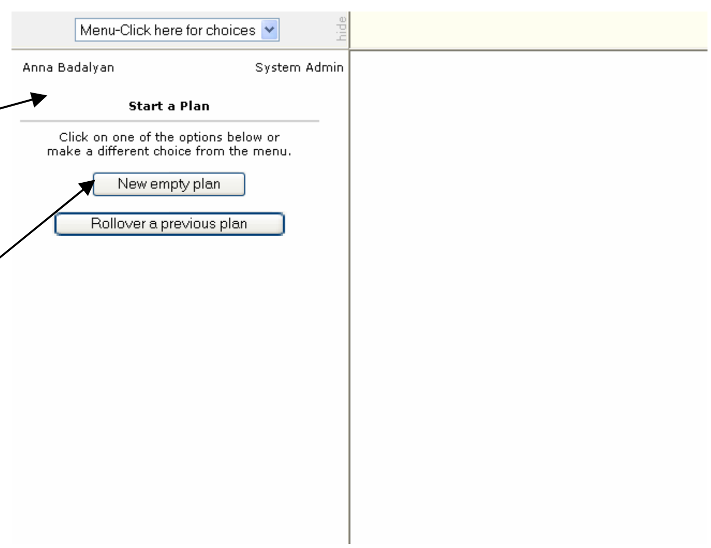
If you log back in later, you can re-trieve your information by clicking on “Open an Existing Plan”



After following the above steps, you will end up with this “Start a Plan” screen.

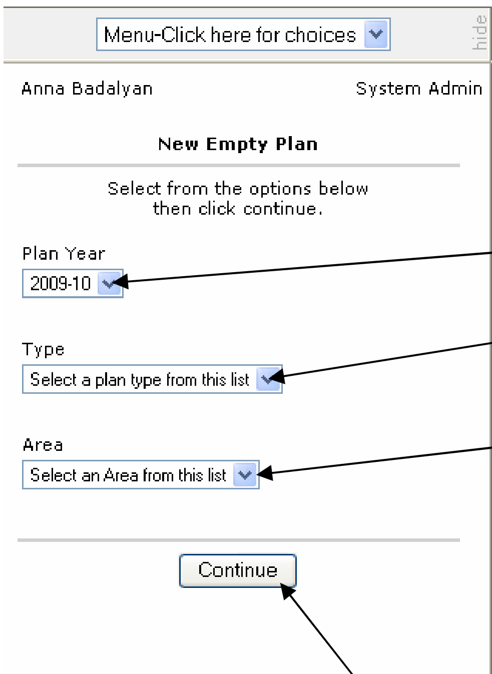
Step 2

Click on the “New Empty Plan”



Create a New Plan

Here is your "New Empty Plan" screen.



Step 3

Select the desired Plan Year.

Step 4

Select the desired Plan Type

Step 5

Select the desired Area.

Step 6

After all sections are completed, click continue.

This "Microsoft Internet Explorer" screen will appear next.

Make sure all of your information is correct.

Step 7

Click "OK" if you want to proceed creating the plan.

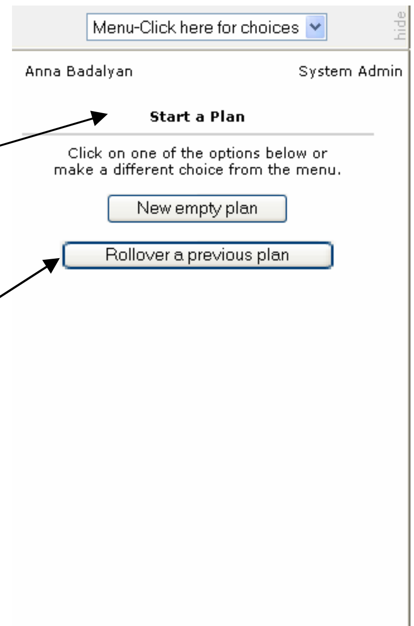
SECTION 3: Rollover an Existing Plan

Rollover an existing plan

If you are starting a plan when a previous online plan already exists, all you have to do is update all your previously entered data.

Step 1

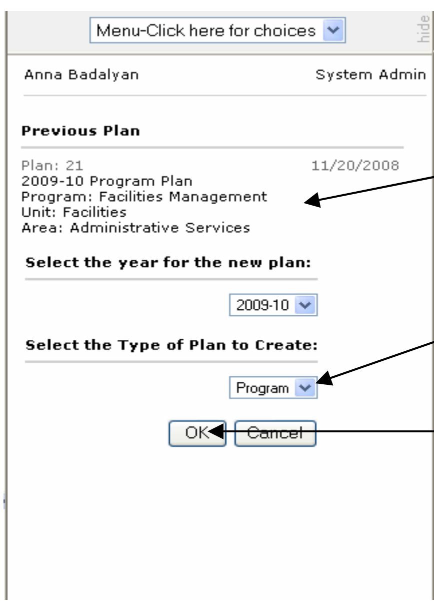
Click on "Start a New Plan" again.



The "Start a Plan" screen will appear.

Step 2

Click on **"Rollover a Previous Plan"**, it will allow you to rollover information from your previous online plan, to your current one.



Make sure all your information is correct.

Step 3

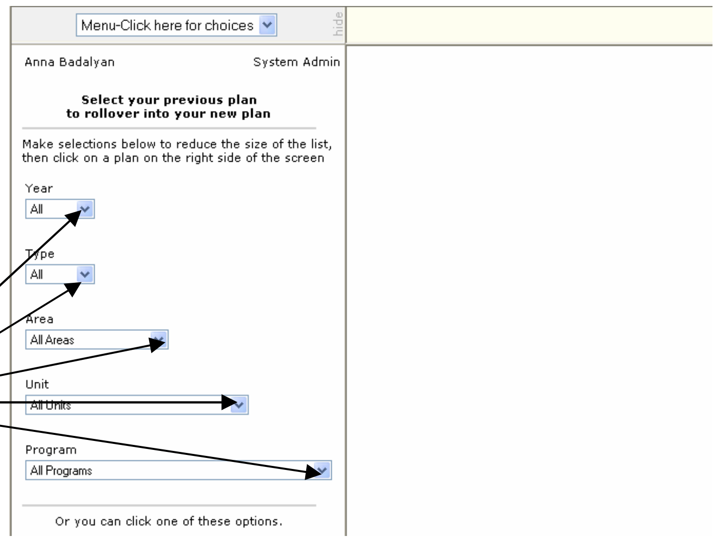
Select the "Type" of plan.

Step 4

Click "OK"

Rollover an existing plan

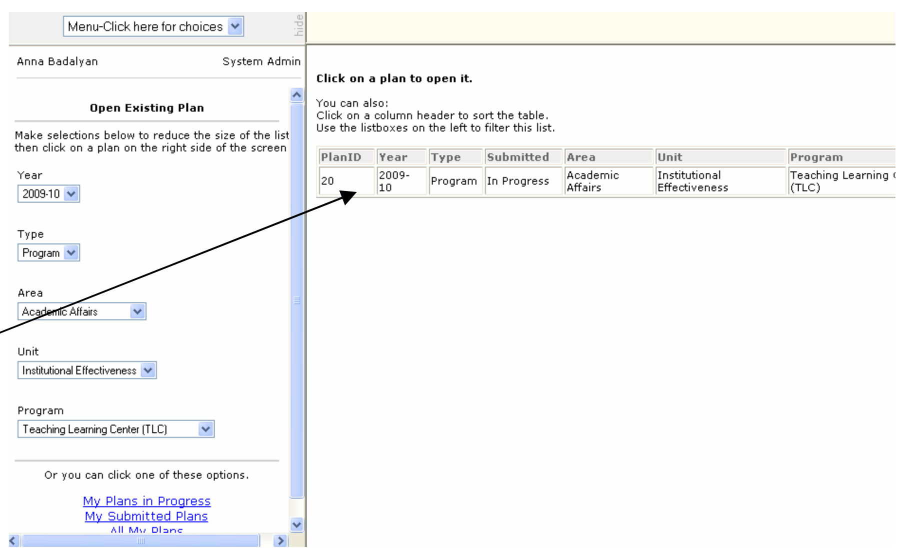
Now you will need to locate your previous plan.



In order to easily locate your plan, you can narrow down the list by entering the specific information. (year, type, area, etc.)

Step 5

Put in all the information of the plan you would like to locate.



Step 6

After you are satisfied with the selections you have made, choose the previous online plan that you want to rollover into your new online plan.

Plan / Create your Team

You need to create your planning team before anyone can work on or sign-off on your online plan. These are the individuals who collectively developed the plan. This step is very important and should not be overlooked.

• Click the **"Administration"** field located on the left side of the screen**.**
• Click the **"Plan Team"** field**.**
• Decide who are the participants in your Planning Team. The three types of participants are individuals:

1) Who can only write to the plan (e.g., individuals you have assigned to work on (edit) the plan or secretaries who type the plan).

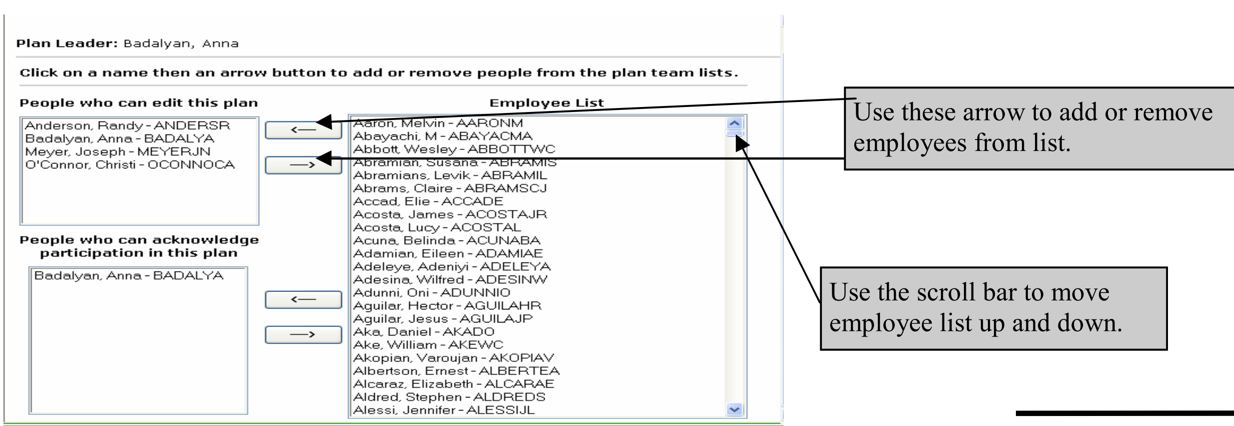
2) Who can acknowledge participation in the development of the plan, but cannot write to the plan.

3) Who can both write to (edit) and acknowledge participation in the development of your plan.

- Go to the **"Employee List"** (located on the right side of the screen) and scroll down to find the employee's name (listed in alphabetical order). An employee must have a LACC Network login name and password to be listed in the **"Employee List."**

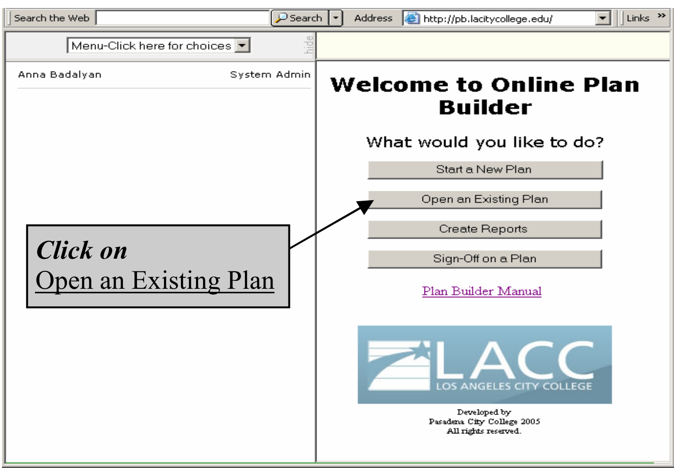
Please Note: For a team member to be able to edit, it is not enough that you add to your team in plan builder. After adding a team member who needs access to your program review, please email system administrator to grant access to the server for that employee.

• Click on the name of the employee.
• Click on an arrow box to add or remove names from the list.
• Once you have inserted all the names of the individuals of your Planning Team, the system will automatically save the employees' names. **NOTE:** The names of the individuals who can edit and acknowledge participation in the development of the plan must be inserted in both the **"People who can edit this plan"** section and the **"People who can acknowledge participation in this plan"** section.

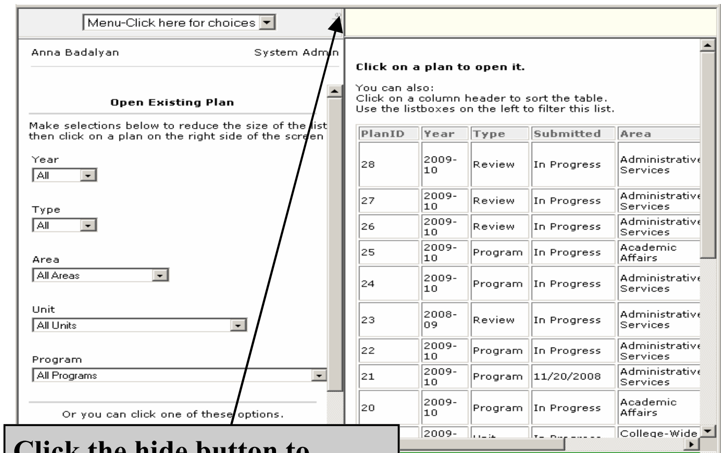


SECTION 5: Open an Existing Plan

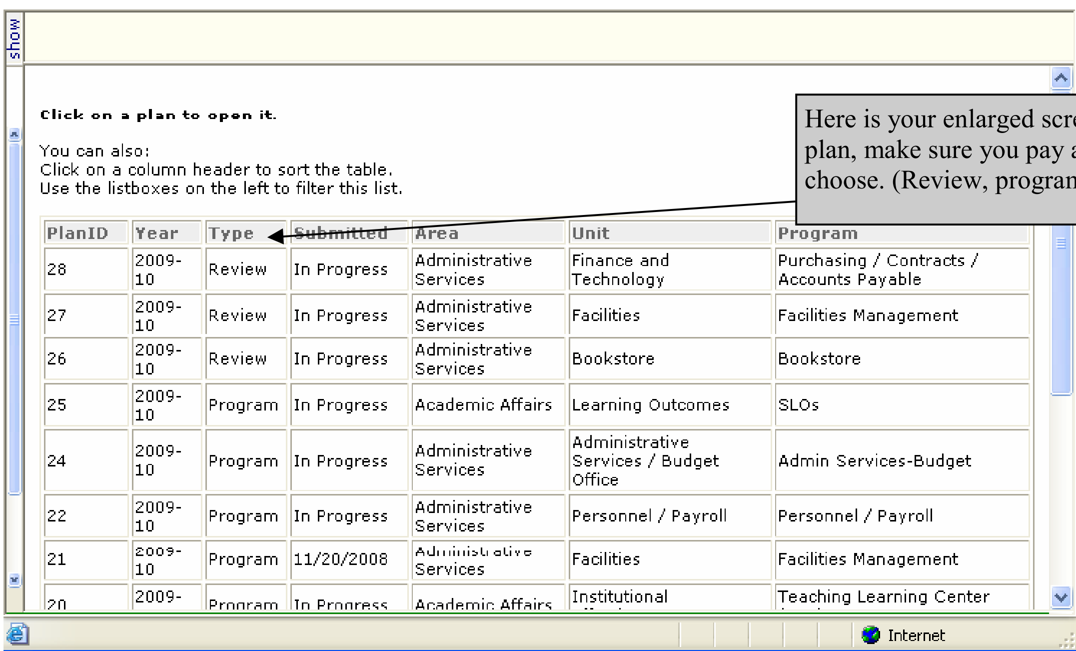
Open an Existing Plan



Click on
Open an Existing Plan



Click the hide button to enlarge screen.



Here is your enlarged screen! When selecting the plan, make sure you pay attention to the **type** you choose. (Review, program, area, unit)

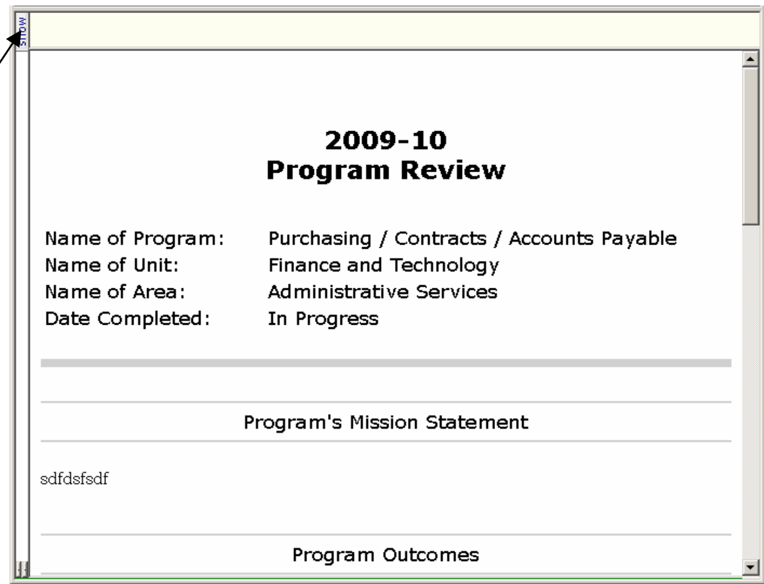
Click on the plan you want to open.

- Do not click on back button during operation, it will interrupt your session.
- To navigate the system, click on the downward arrow on the left hand side of the screen.

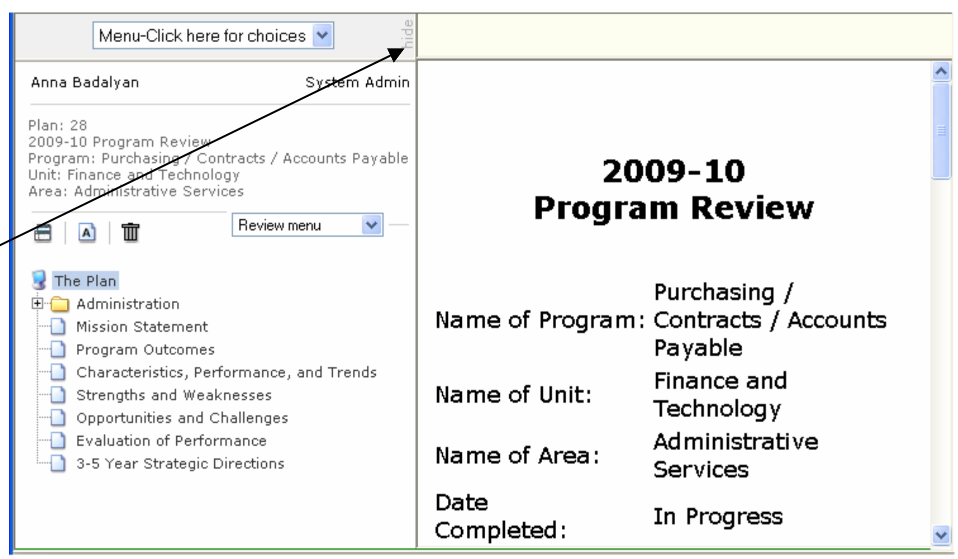
Navigation

If you created a new plan, or opened an existing plan, this page will come up next.

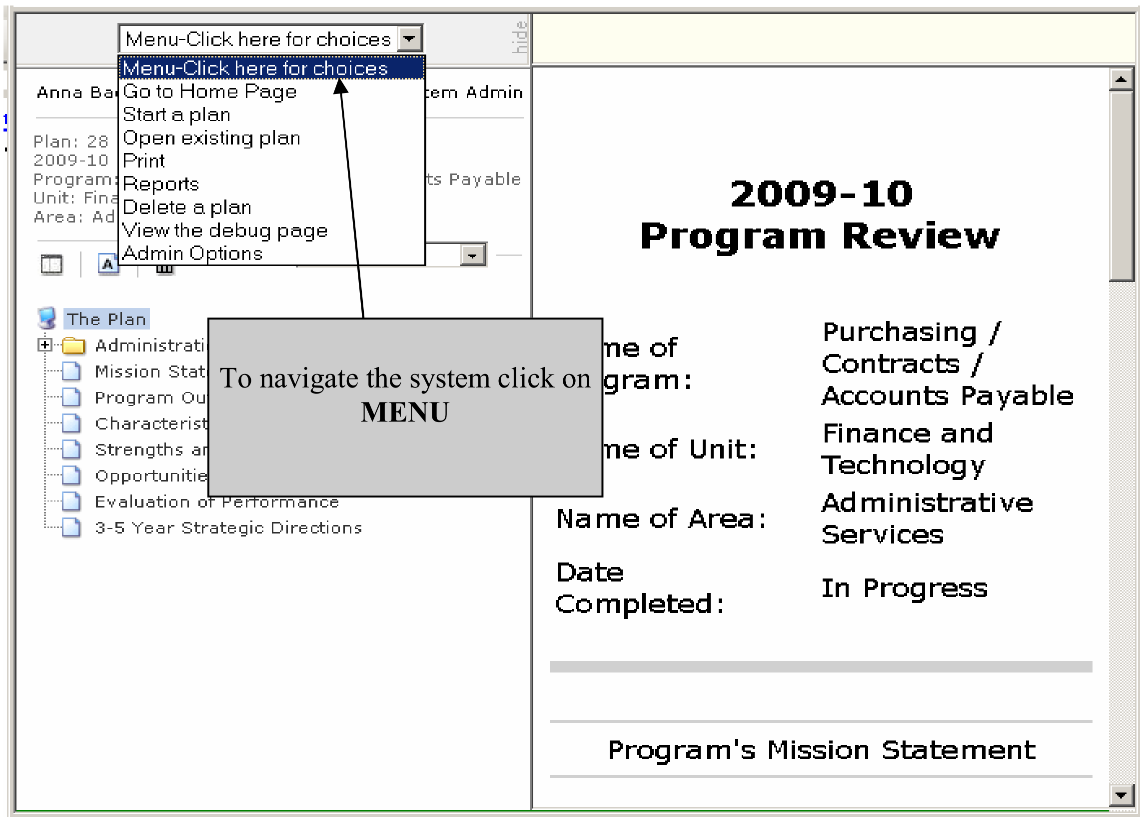
To go back to the original view for navigation in system click on "**show**".



You can always change back the screen view by clicking on "**hide**".

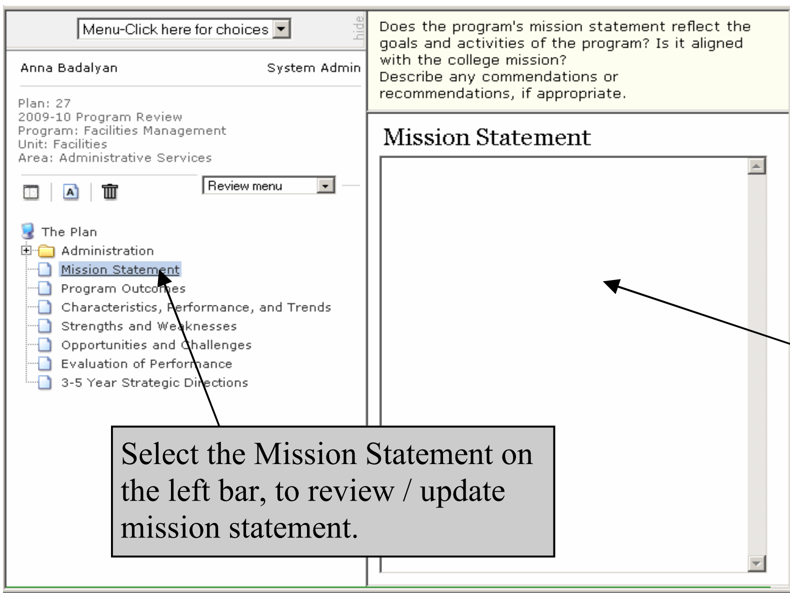


Navigation



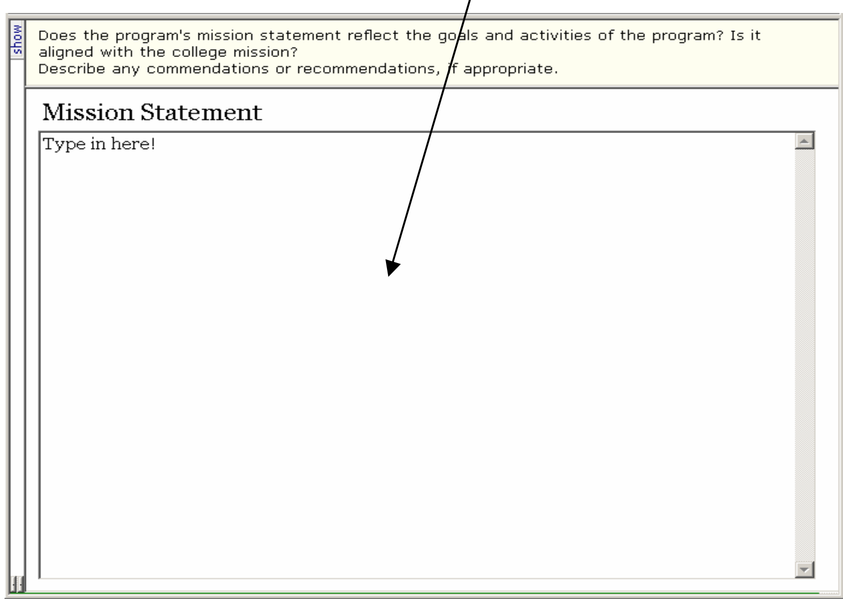
Do not click on back button during operation, it will interrupt your session.

Edit / Update the Plan



Select the Mission Statement on the left bar, to review / update mission statement.

Type in here!



Remember! You can always enlarge the typing area for your convenience.

Repeat this step for all the Sections.
(Mission Statement. Program Outcomes. Characteristics, Performance, and Trends. Strengths and Weaknesses. Opportunities and Challenges. Evaluation of Performance. 3-5 Year Strategic Directions.)

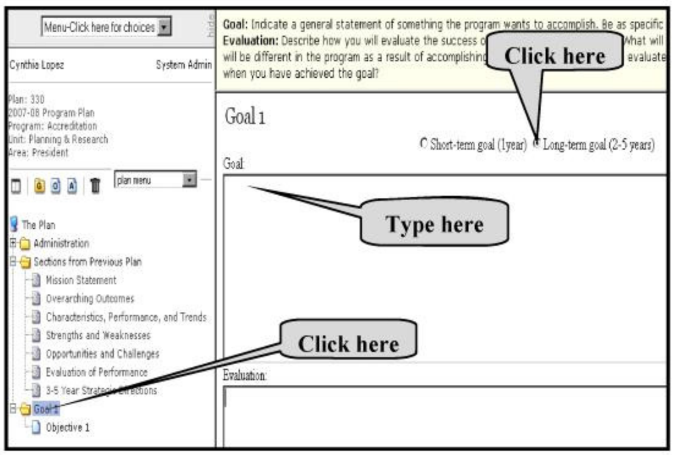
Add / Update Goals & Objectives

Step 1

- Click the **"Goal 1"** field (located on the left side of the screen).

No Previous Online Plan

- Go to your existing plan, highlight and copy goal 1. **PLEASE NOTE:** Copy goals that you plan to carry out during the year for which the plan is being created. In this case, during 2007-2008.. Do not include goals that you have completed.
- Paste your top priority goal in the **"Goal 1"** section of your online plan.
- Indicate whether your goal is short-term (1 year) or long-term (2-5 years) by clicking on one of the options located right above the description of the goal.
- Review this section, and make any necessary updates.



Previous Online Plan

- This is the goal that rolled over from your previous online plan.
- **PLEASE NOTE:** Keep goals that you plan to carry out during the year for which the plan is being created. In this case, during 2007-2008. Do not keep goals that you have completed or abandon.
- Review this section, and make any necessary updates.

Add / Update Goals & Objectives

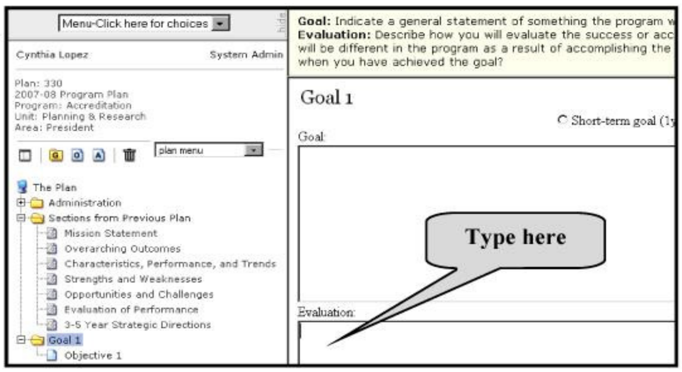
To enter or update the evaluation of goal 1.

Step 2

- Click in the **"Evaluation"** section of your online plan (under the **"Goal 1"** section). In this section, you need to state how you will determine if your goal is achieved.

No Previous Online Plan

- Go to your existing plan, highlight and copy the evaluation of goal 1.
- Paste the evaluation of goal 1 in this section.
- Review this section, and make any necessary updates.



Previous Online Plan

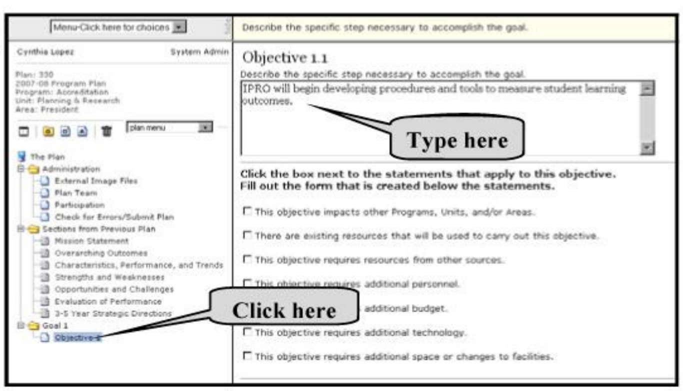
- This is the evaluation of goal 1 that rolled over from your previous online plan.
- Review this section, and make any necessary updates

Step 3 **To enter or update objective 1 of goal 1.**

- Click on the **"+"** sign next to **"Goal 1"** to open your **"Goal 1"** folder and show the objective(s) under your goal.
- Click the **"Objective 1"** field located on the left side of the screen.

No Previous Online Plan

- Go to your existing plan, highlight and copy objective 1 of goal 1.
- **PLEASE NOTE:** Copy objectives that you plan to carry out during 2007-2008. Do not include objectives that you have completed.
- Paste objective 1 of goal 1 in this section.
- Review this section, and make any necessary updates.



Previous Online Plan

- This is the objective that rolled over, with its goal, from your previous online plan.
- **PLEASE NOTE:** Copy objectives that you plan to carry out during 2007-2008. Do not include objectives that you have completed or abandon.
- Review this section, and make any necessary updates.

Add / Update Goals & Objectives

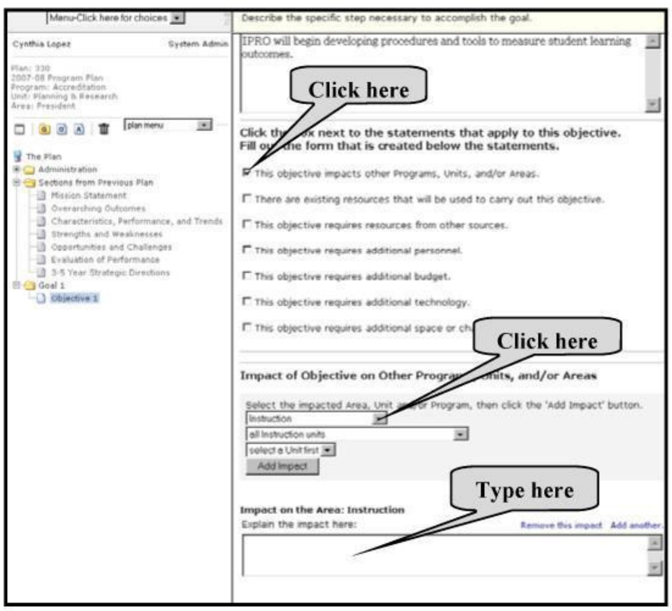
ATTENTION—PLEASE READ BEFORE YOU PROCEED

Under each objective are a series of boxes that can be checked to provide more information about your objective. Click each item that applies. For each box you check, the supporting information boxes will appear underneath the series of boxes in your plan. **Please do not click the box and then type in "None" in the section.** Click only the boxes that refer to the resources you will need to carryout your objective. If you clicked in a box by accident, unclick the box. This will remove the section you created.

Step 4 **To indicate or update that your objective will have an impact.**
If the objective you have just entered will have an impact on another program, unit, or area, you need to indicate the impact in this section.

No Previous Online Plan

- Click in the box next to the **"This objective impacts other Programs, Units, and/or Areas"** sentence.
- The **"Impact of Objective on Other Programs, Units, and/or Areas"** section will appear.
- Select the impacted area, unit, and/or program, then click the **"Add Impact"** box.
- Go to your existing plan, highlight and copy the impact that the objective will have on other programs, units, and/or areas.
- Paste the impact of your objective in the **"Explain the impact here"** section of your online plan.
- Review this section, and make any necessary updates.



Previous Online Plan

- If the box next to the **"This objective impacts other Programs, Units, and/or Areas"** sentence is checked, this is the **"Impact of Objective on Other Programs, Units, and/or Areas"** section that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

TIP! To indicate that your objective will impact more than one program, unit, or area.

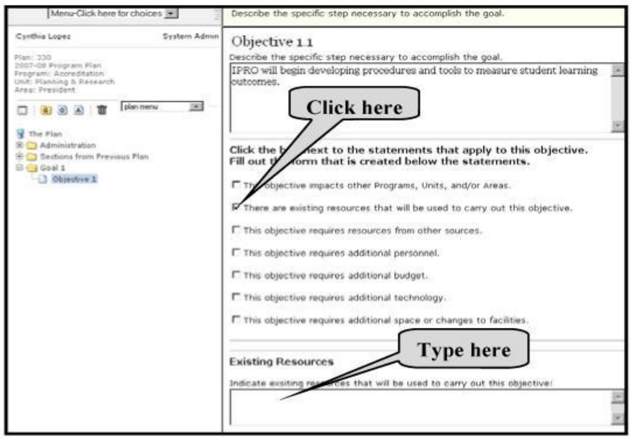
- *For your first impact, follow step 4.*
- *For your second impact, click the "Add Another" field located right above the section where you explained the impact of your first impact. Then, follow step 4. If you created a second impact by accident, remove the impact by clicking on the "Remove This Impact" field.*

Add / Update Goals & Objectives

Step 5 **To indicate or update that your objective will be carried out with existing resources.**

No Previous Online Plan

- Click in the box next to the **"There are existing resources that will be used to carry out this objective"** sentence.
- The **"Existing Resources"** section will appear.
- Go to your existing plan, highlight and copy the existing resources.
- Paste the existing resources in the **"Existing Resources"** section of your online plan.
- Review this section, and make any necessary updates.



Previous Online Plan

- If the box next to the **"There are existing resources that will be used to carry out this objective"** sentence is checked, this is the **"Existing Resources"** section that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

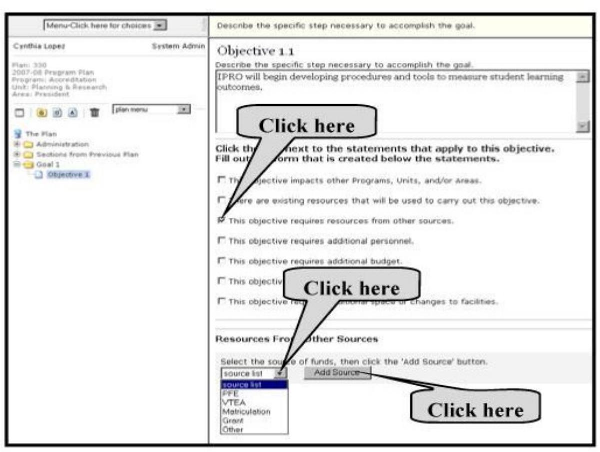
ATTENTION—PLEASE READ BEFORE YOU PROCEED

Follow Steps **6a and 6b or 6c** to indicate that your objective requires resources from other sources.

Step 6a **To indicate or update that your objective requires resources from other sources.**

No Previous Online Plan

- Click in the box next to the **"This objective requires resources from other sources"** sentence.
- The **"Resources from Other Sources"** section will appear.
- Select the source of funds (e.g., PFE, VTEA, etc.) from the **"source list,"** then click the **"Add Source"** box.
- If you have selected PFE, VTEA, or Matriculation, go to Step 6 If you have selected Grant or other sources, go to Step 6



Previous Online Plan

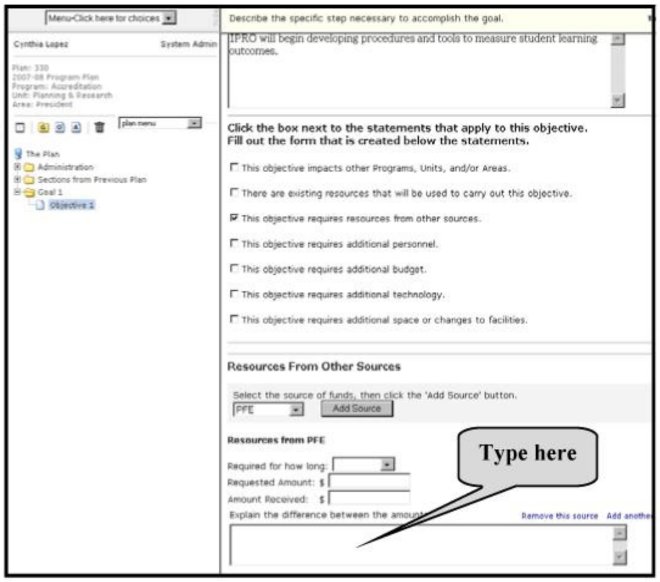
- If the box next to the **"This objective requires resources from other sources"** sentence is checked, this is the **"Resources from Other Sources"** section that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

Add / Update Goals & Objectives

Step 6b **To enter or update the resource from PFE, VTEA, or Matriculation section.**

No Previous Online Plan

- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the resource is required. In other words, if you will need VTEA funds for two years to carryout this objective, indicate it here.
- Go to your existing plan, highlight and copy the requested amount. Paste or type in the requested amount in the **"Requested Amount"** section of your online plan.
- Go to your existing plan, highlight and copy. Paste or type in the amount received in the **"Amount Received"** section of your online plan.
- Go to your existing plan, highlight and copy the explanation of the difference between the amounts. Paste your explanation of the difference between the amounts in the **"Explain the difference between the amounts"** section of your online plan.
- Review this section, and make any necessary updates.



Previous Online Plan

- This is the resources from PFE, VTEA, or Matriculation section that rolled over from your previous online plan.
- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the resource is required. For instance, if you will need VTEA funds for two years to carryout your objective, indicate it here.
- Review this section, and make any necessary updates.

TIP! To indicate that your objective will require resources from more than one source.

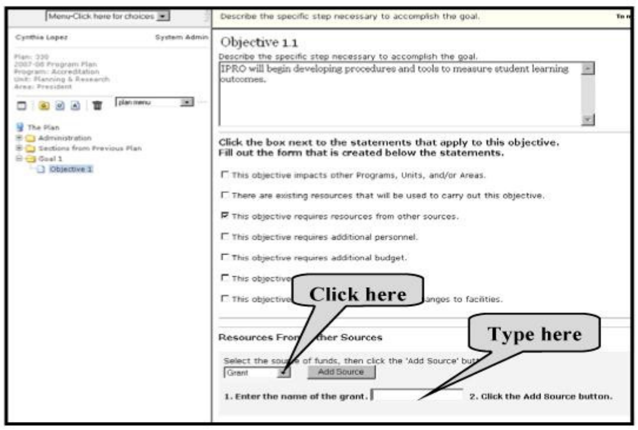
- *For your first soource, follow steps 6a and 6b.*
- *For your second source, click the "Add Another" field located right above the section where you explained the difference between the amounts.*
- *Select the source of funds (e.g., PFE, VTEA, etc.) from the "Source List", then click the "Add Source" box. The "Resources from Other" section for your second source will come up right above your first source. Then, follow step 6b or 6c. If you created a second source by accident, remove the source by clicking on the "Remove this source" field.*

Add / Update Goals & Objectives

Step 6c **To enter or update the resources from a grant or other sources section.**

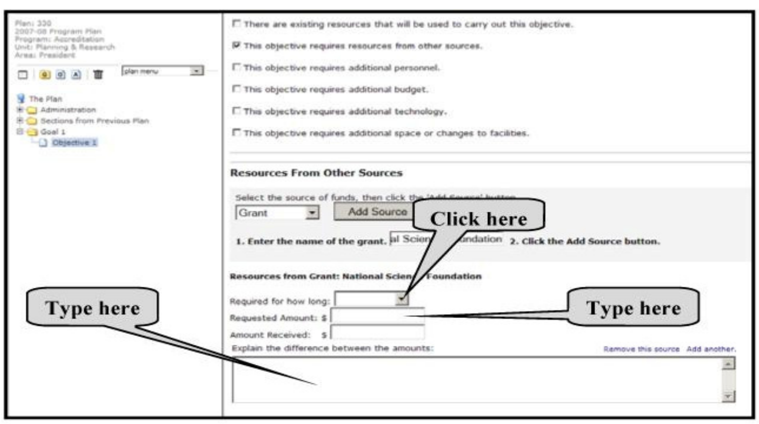
No Previous Online Plan

- Select **"Grant"** from the **"source of funds list."** The **"Enter the name of the grant"** section will come up.
- Go to your existing plan, highlight and copy the name of the grant. Paste the name of the grant in the **"Enter the name of the grant"** section of your online plan.
- Click the **"Add Source"** box.
- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the resource is required.
- Go to your existing plan, highlight and copy the requested amount or type in an amount. Paste or type in the requested amount in the **"Requested Amount"** section of your online plan.
- Go to your existing plan, highlight and copy the amount received or type in an amount. Paste or type in the amount received in the **"Amount Received"** section of your online plan.
- Go to your existing plan, highlight and copy the explanation of the difference between the amounts. Paste your explanation of the difference between the amounts in the **"Explain the difference between the amounts"** section of your online plan.
- Review the section, and make any necessary updates.



Previous Online Plan

- This is the resources from a grant or other sources section that rolled over from your previous online plan.
- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the resource is required.
- Review this section, and make any necessary updates.



TIP! To indicate that your objective will require resources from more than one source.

- *For your first source, follow steps 6a and 6b.*
- *For your second source, click the "Add Another" field located right above the section where you explained the difference between the amounts.*
- *Select the source of funds (e.g., PFE, VTEA, etc.) from the "Source List", then click the "Add Source" box. The "Resources from Other" section for your second source will come up right above your first source. Then, follow step 6b or 6c. If you created a second source by accident, remove the source by clicking on the "Remove this source" field.*

Add / Update Goals & Objectives

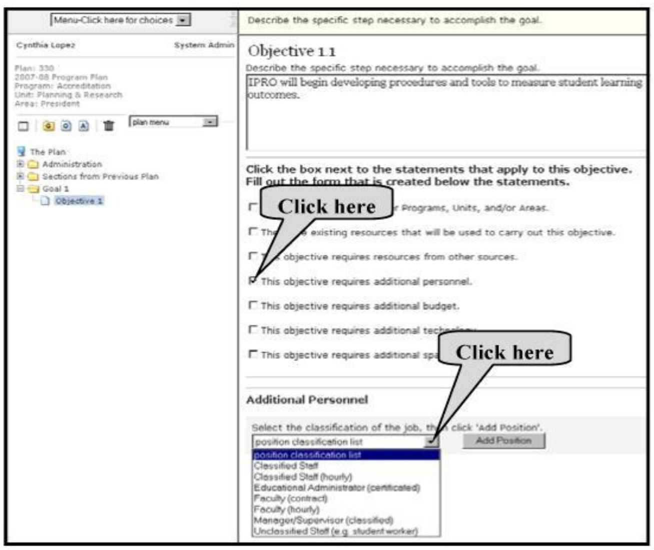
ATTENTION—PLEASE READ BEFORE YOU PROCEED

Follow Steps 6 a and 6 b to indicate that your objective requires additional personnel.

Step 7a **To indicate or update that the objective requires additional personnel.**

No Previous Online Plan

- Click in the box next to the **"This objective requires additional personnel"** sentence.
- The **"Additional Personnel"** section will come up.
- Select the classification of the position (faculty, unclassified staff, etc.). Note that the classification of the position is not the method of payment (stipends, reassignment, etc.).
- You will be able to describe the method of payment in the **"Position Description"** section (see Step 7 b) of the online plan. The classification of the position is the job classification that a manager would indicate on the personnel documents submitted to payroll.
- Click the **"Add Position"** box.
- Review this section, and make any necessary updates.



Previous Online Plan

- If the box next to the **"This objective requires additional personnel"** sentence is checked, this is the personnel request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

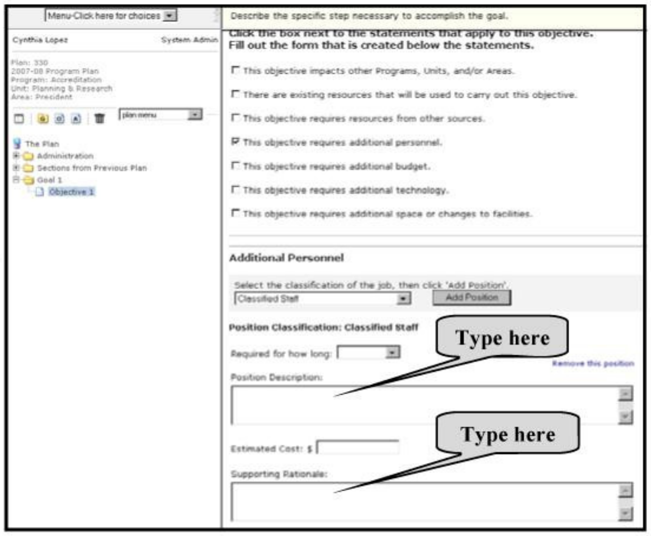
TIP! The classification of the position is the job classification that a manager would indicate on the personnel documents submitted to payroll.

Add / Update Goals & Objectives

Step 7b **To enter or update the description of the position.**

No Previous Online Plan

- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the position is required.
- Go to your existing plan, highlight and copy the description of the position.
- Paste the description of the position in the **"Position Description"** section of your online plan.
- Go to your existing plan, highlight and copy the estimated cost.
- Paste the estimated cost in the **"Estimated Cost"** section of your online plan.
- Go to your existing plan, highlight and copy the supporting rationale.
- Paste the supporting rationale in the **"Supporting Rationale"** section of your online plan.
- Review this section, and make any necessary updates.



Previous Online Plan

- This is the description of the position that rolled over from your previous online plan.
- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the position is required.
- Review this section, and make any necessary updates.

TIP!

To indicate that your objective will require a request for <u>more than one</u> personnel position.

- For your first request, follow Steps 7a and 7b.
- For your second request, select the classification of the position (faculty, unclassified staff, etc.), and then click the **"Add Position"** box. The **"Position Description"** section for your second position will come up right above your first request. Then, follow Step 7b. If you created a second position by accident, remove the request by clicking on the **"Remove this position "** field.

Add / Update Goals & Objectives

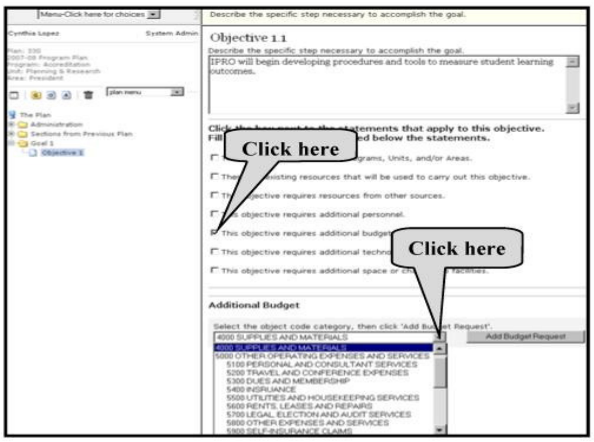
ATTENTION—PLEASE READ BEFORE YOU PROCEED

Follow Steps 8 a and 8 b to indicate that your objective requires additional budget.

Step 8a **To indicate or update that the objective requires additional budget.**

No Previous Online Plan

- Click in the box next to the **"This objective requires additional budget"** sentence.
- The **"Additional Budget"** section will come up.
- Select the object code category, and then click on the **"Add Budget Request"** box.
- Review this section, and make any necessary updates.



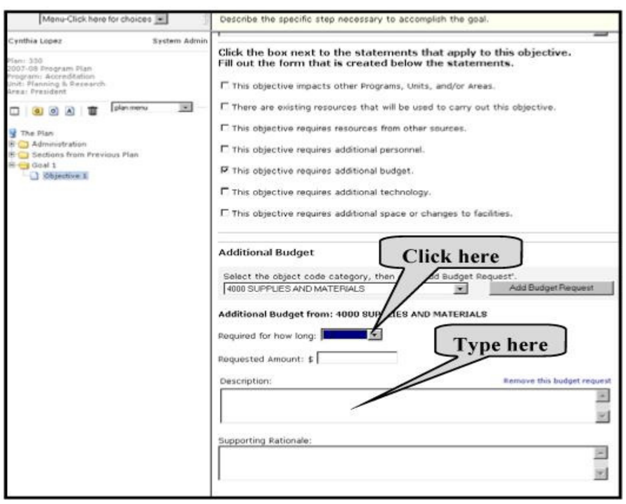
Previous Online Plan

- If the box next to the **"This objective requires additional budget"** sentence is checked, this is the additional budget request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

Step 8b To enter or update the amount and description of the additional budget section.

No Previous Online Plan

- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the additional budget is required.
- Go to your existing plan, highlight and copy the requested amount. Paste the requested amount in the **"Requested Amount"** section of your online plan.
- Go to your existing plan, highlight and copy the description. Paste the description in the **"Description"** section of your online plan.
- Go to your existing plan, highlight and copy the supporting rationale. Paste the supporting rationale in the **"Supporting Rationale"** section of your online plan.
- Review your objective, and make any necessary updates.



Previous Online Plan

- This is the additional budget request that rolled over from your previous online plan.
- **New!** - Click the downward arrow next to the **"Required for how long"** sentence and select the number of years the additional budget is required.
- Review this section, and make any necessary updates.

Add / Update Goals & Objectives

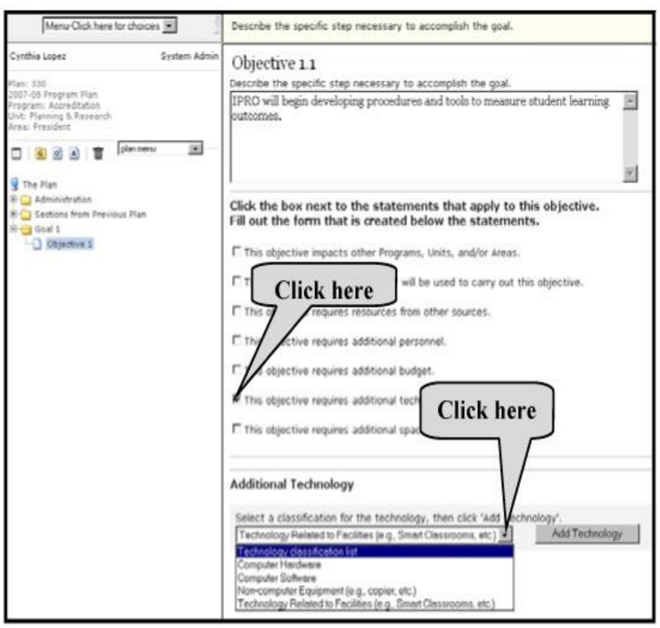
ATTENTION—PLEASE READ

Follow Steps 9 a and 9 b to indicate that your objective requires additional technology.

Step 9a **To indicate or update that the objective requires additional technology.**

No Previous Online Plan

- Click in the box next to the **"This objective requires additional technology"** sentence.
- The **"Additional Technology"** section will come up.
- Select a classification for the technology you will need from the **"Technology classification list,"** and then click on the **"Add Technology"** box.
- Review this section, and make any necessary updates.



Previous Online Plan

- If the box next to the **"This objective requires additional technology"** sentence is checked, this is the technology request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.

Add / Update Goals & Objectives

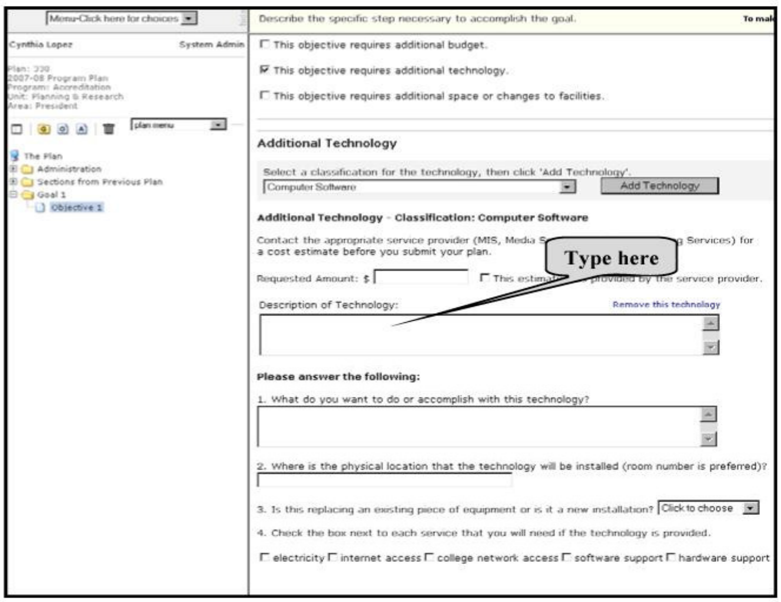
Step 9b **To enter or update the additional technology information section.**

No Previous Online Plan

- Go to your existing plan, highlight and copy the requested amount. Paste or type in the requested amount in the **"Requested Amount"** section of your online plan.
- Go to your existing plan, highlight and copy the description of the technology. Paste the description of the technology in the **"Description of Technology"** section of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 1.
- Paste the answer to Question 1 in the section of Question 1 (what do you want to do or accomplish with this technology?) of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 2.
- Paste the answer to Question 2 in the section of Question 2 (where is the physical location that the technology will be installed?) of your online plan.
- Click the downward arrow next to the **"Is this replacing an existing piece of equipment or is it a new installation?"** question to answer Question 3.
- Click the box next to each service (electricity, internet access, etc.) that you will need if the technology is provided.
- Review this section, and make any necessary updates.

Previous Online Plan

- This is the additional budget request that rolled over from your previous online plan.
- Review this section, and make any necessary updates.



TIP! **To indicate that your objective will require <u>more than one</u> technology request.**

- For your first technology request, follow Steps 9 a and 9 b.
- For your second technology request, select the classification of your technology from the **"Technology classification list,"** and then click on the **"Add Technology"** box. The **"Description of Technology "** section for you second technology request will come up right above your first technology request. Then, follow Step 9 b. If you created a second technology request by accident, remove the request by clicking on the **"Remove this technology"** field.

Add / Update Goals & Objectives

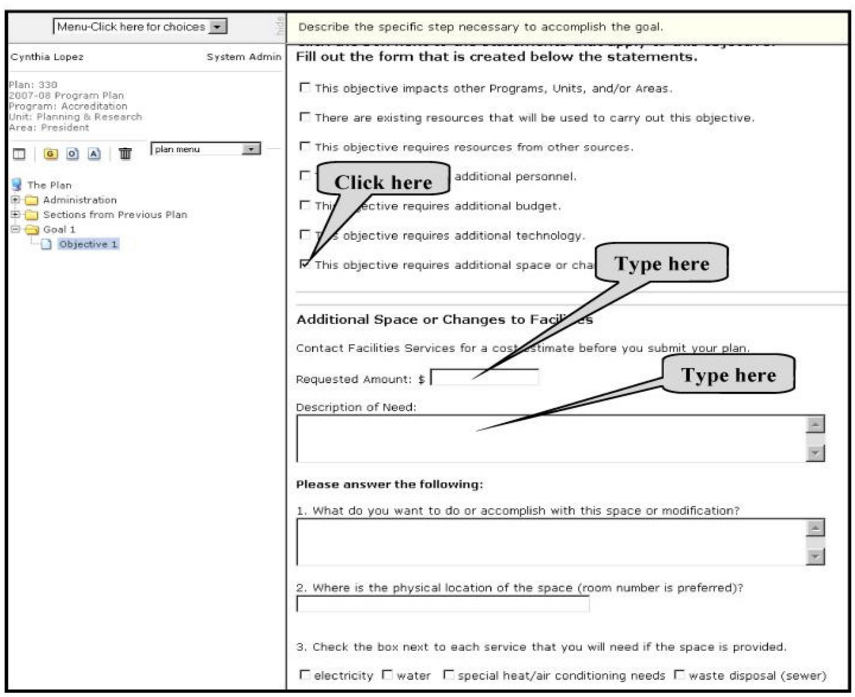
Step 10 **To indicate or update that the objective requires additional space or changes to facilities.**

No Previous Online Plan

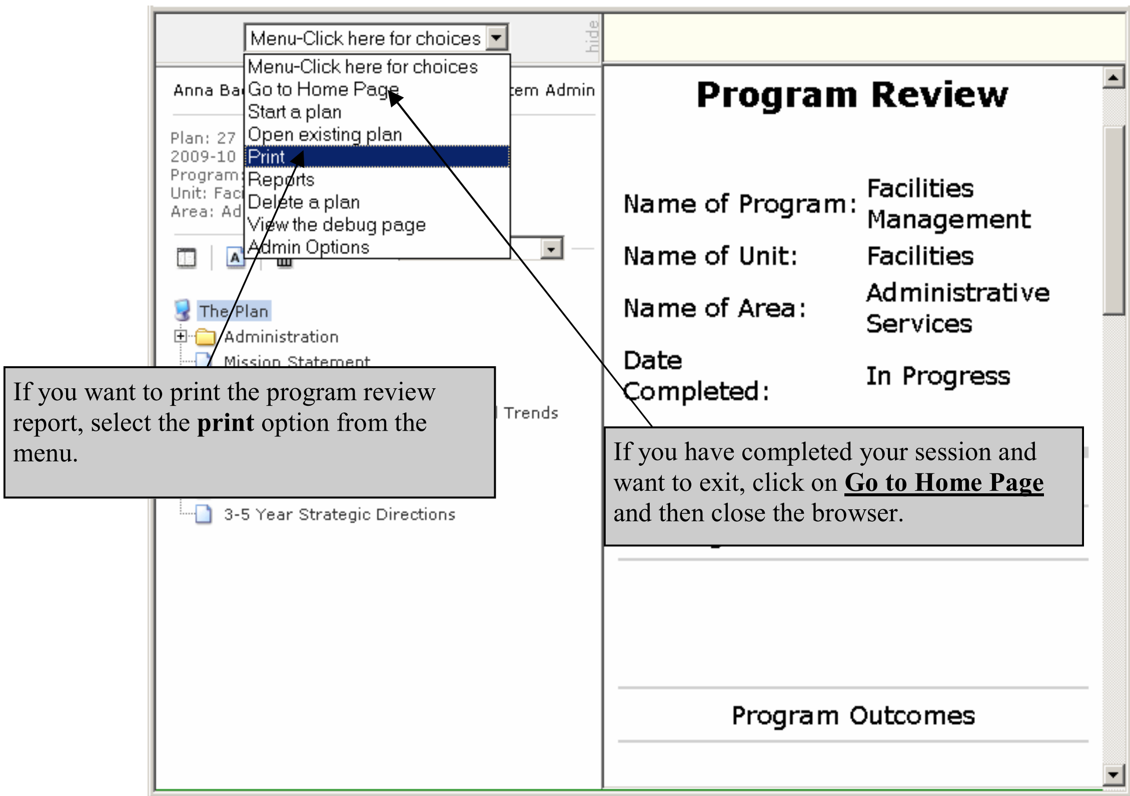
- Click the box next to the **"This objective requires additional space or changes to facilities"** sentence**.**
- The **"Additional Space or Changes to Facilities"** section will come up.
- Go to your existing plan, highlight and copy the requested amount.
- Paste or type in the requested amount in the **"Requested Amount"** section of your online plan.
- Go to your existing plan, highlight and copy the description of the need.
- Paste the description of the need in the **"Description of Need"** section of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 1.
- Paste the answer to Question 1 in the section of Question 1 (what do you want to do or accomplish with this space or modification?) of your online plan.
- Go to your existing plan, highlight and copy the answer to Question 2.
- Paste the answer to Question 2 in the section of Question 2 (where is the physical location of the space?) of your online plan.
- Click the box next to each service (electricity, water, etc.) that you will need if the space is provided (Question 3).
- Review this section, and make any necessary updates.

Previous Online Plan

- If the box next to the **"This objective requires additional space or changes to facilities"** sentence is checked, this is the additional space or changes to facilities section that rolled over from your previous online plan.
    - Review this section, and make any necessary updates.



To Print the Entire Document



Sign -Off on a Plan.

To sign-off on a plan.

WASC requires institutions to show proof that plans were developed by a representative group of the entire program, unit, or area. WASC also requires that institutions show proof that the results of a plan are communicated to all the individuals in the program, unit, or area. The online system has been designed to help you provide evidence to WASC that your plan was developed by a representative group and that the results of the plan were communicated to constituents in your program, unit, or area. **This step is very important and should not be overlooked.**

First, all program, unit, and area managers need to ask individuals on their Planning Team to sign-off on a plan. Second, all program, unit, and area managers need to let employees in their program, unit, and area know that they can review the plan on the online system. This will ensure that results of the plan are communicated to all the employees in the program, unit, or area. Please ask individuals to follow the steps below:

1st Step: Log-on to the System and Locate the Plan

- Log on to the online planning system you want to sign off.
- Click the **"Sign-Off on a Plan"** box. Locate the plan

2nd Step: Sign-off for Team Participation and Acknowledgement

-Individuals Who can Only Edit the Development of the Plan (Cannot Edit the Plan)

- Review the plan.
- Click the **"Administration"** field (located on the left side of the screen).
- Click the **"Participation"** field.
- Click the **"reviewed"** word in the **"I acknowledge that while I was not involved in the development of this plan, I have reviewed it"** (located on the upper left side). After you click the **"reviewed"** word, your name will automatically appear under the **"Participant List for this Plan"** section.

-Individuals Who can Only Acknowledge Participation in the Development of the Plan (Cannot Edit the Plan)

- Review the plan.
- Click the **"participated"** word in the **"I acknowledge that I participated in the development of this plan"** sentence (located in the upper left side). After you click the **"participated"** word, your name will automatically appear under the **"Participant List for this Plan"** section.

-Individuals Who can Edit and Acknowledge Participation in the Development of the Plan

- Review the plan.
- Click the **"Administration"** field (located on the left side of the screen).
- Click the **"Participation"** field.
- Click the **"participated"** word in the **"I acknowledge that I participated in the development of this plan"** sentence. After you click the **"participated"** word, your name will automatically appear under the **"Participant List for this Plan"** section.

-Individuals Who can Only Review the Plan (Cannot Edit and Cannot Acknowledge Participation in Plan)

- Review the plan.
- Click the **"reviewed"** word in the **"I acknowledge that while I was not involved in the development of this plan, I have reviewed it"** (located on the upper left side). After you click the **"reviewed"** word, your name will automatically appear under the **"Participant List for this Plan"** section. Note that any employee that has a LACC Network user name and password can sign-off as having reviewed a plan.

Sign -Off on a Plan.

ATTENTION—PLEASE READ BEFORE YOU PROCEED

Before you submit your plan, please ask the members of your Planning Team to sign-off on the plan.

3rd Step: **To check for errors in a plan.**

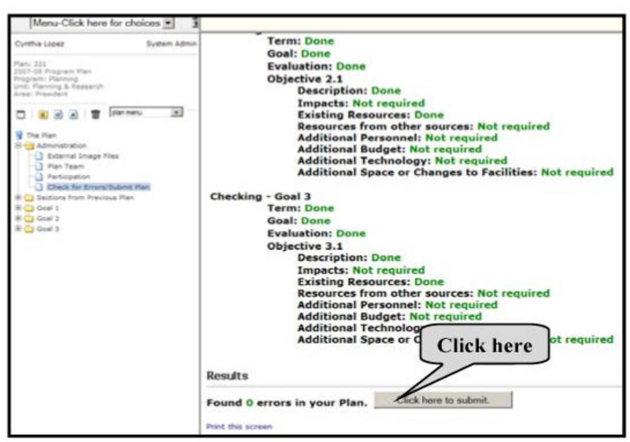
- Click the **"Administration"** field (located on the left side of the screen).
- Click the **"Check for Errors/Submit Plan"** field.
- The system will display **"Done"** (in green text) for each field you completed correctly.
- For each error (in red text), the system will give the reason for the error. The system will also display the number of errors in your plan (bottom of the screen). You will need to correct the errors. If you do not fix your errors, you will not be able to submit your completed plan.

- After you correct the errors you will get the **"Submit"** box at the bottom of your screen.

4th Step: **To submit a completed online plan.**
After you have fixed all the errors or your plan is free of errors, you can submit your plan.

TIP! Do not submit your completed plan until all participants have signed off (see step 2). After a plan is submitted, the participants and reviewers will not be able to sign-off.

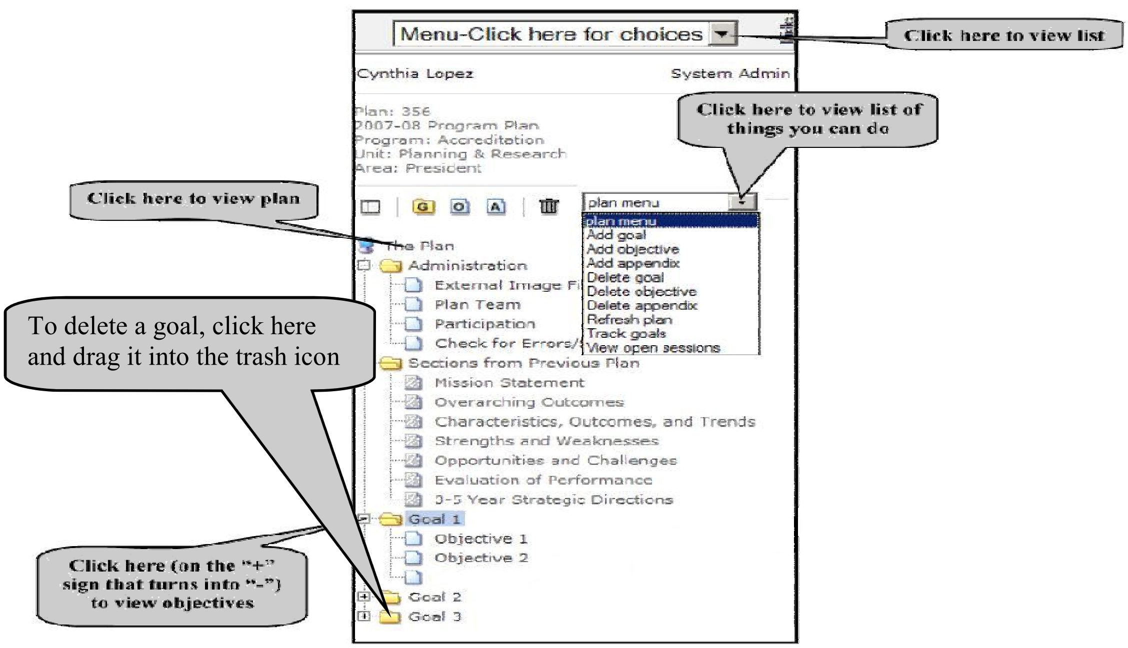
- Click the **"Administration"** field (located on the left side of the screen).
- Click the **"Check for Errors/Submit Plan"** field.
- If your plan is free of errors, the **"Click here to submit"** box will appear at the bottom of the screen.
- Click the **"Click here to submit"** box to submit your plan.



Congratulations! You have successfully completed your plan.

Tools Available

*SAVE THE UPDATED INFORMATION ,
*LOGOFF THE ONLINE SYSTEM,
*VIEW CONTENTS OF A FOLDER,
*VIEW A PLAN,
*ADD A GOAL,
*ADD AN OBJECTIVE,
*ADD AN APPENDIX,
*CHANGE THE ORDER OF A GOAL OB JECTIVE OR AN APPENDIX,
*DELETE A GOAL,
*DELETE AN OBJECTIVE,
*DELETE AN APPENDIX,
*PRINT A PLAN,
*DELETE A PLAN,
*START A PLAN,
*UPLOAD TABLES, CHARTS, AND/OR PICTURES,
*DO NOT CLICK "BACK" DURING OPERATION



Listed below are tools available on the online system.

SAVE INFORMATION YOU HAVE ENTERED OR PASTED

Steps : To save the information you have entered or pasted in your online plan.

- Enter or paste the information in the appropriate section. Note that if you have any special formatting such as special fonts, borders, bolding, font color, etc., it will not remain.
- Once you have entered or pasted the information in the section, go on to the another section.
- When you leave a section, the system automatically saves the information you have entered or pasted.

TIP! You cannot create or copy tables, charts, and/or pictures into your online plan. However, you can upload tables, charts, and/or pictures into your online plan

LOGOFF THE ONLINE SYSTEM

Steps : To logoff the online system.

- Click the **"X"** located on the top right hand corner of your screen.
- Or, click **"File"** located on the toolbar (left hand corner), and then click **"Close."**

TIP! The online system will automatically log you off when you stop working on it for an extended period of time.

Tools Available

VIEW CONTENTS OF A FOLDER

Steps: To view contents of a folder.

- Click the **"+"** sign next to the icon to view contents of a folder.
- It will change from a **"+"** sign into a **"-"** sign

VIEW A PLAN

Steps: To view your online plan or to see how the plan will look when you print it.

- Click the **"The Plan"** field located at the top of the list (below the **"plan menu"** field).
- Your online plan will appear on the right hand side. Note that any new information you have entered or pasted in a section will be displayed.

ADD A GOAL

Steps: To add an additional goal.

- Click the goal icon G located on the upper left hand side of the screen.
- Or, click the downward arrow next to the **"plan menu"** field, and then select **"Add goal."**
- After you click the goal icon or select **"Add goal"** on the **"plan menu"** field, the new goal will appear on the screen. The system will automatically add one objective when you add a goal.

ADD AN OBJECTIVE

Steps: To add an additional objective.

- Click on the **"+"** sign next to **"Goal 1"** to open your **"Goal 1"** folder and show the objective(s) under your goal.
- Click the objective icon O located on the upper left hand side of the screen.
- Or, click the downward arrow next to the **"plan menu"** field, and then select **"Add objective."**
- After you click the objective icon or select **"Add objective"** on the **"plan menu"** field, the new objective will appear on the screen.

ADD AN APPENDIX

Steps: To add an additional appendix.

- Click the appendix icon A located on the upper left hand side of the screen.
- Or, click the downward arrow next to the **"plan menu"** field, and then select **"Add appendix."**
- After you click the appendix icon or select **"Add appendix"** on the **"plan menu"** field, the new appendix will appear on the screen.

Tools Available

CHANGE THE ORDER OF A GOAL, OBJECTIVE, OR AN APPENDIX

Steps: To change the order of a goal, objective, or an appendix.

Change the order of a goal:

- Click the folder icon next to the goal you would like to change the order and drag it on top of the folder icon next to the goal number you would like it to change to. For example, if you want to change Goal 3 and its objectives into Goal 1, then click the folder icon next to Goal 3 and drag it on top of the folder icon next to Goal 1. This will turn Goal 3 and its objectives to Goal 1 and automatically change what was previously Goal 1 into Goal 2. Note that when you change the order of a goal the objectives will also automatically move with the goal.
- A message will come up on the screen that asks if you want to make the change. Click **"OK."**

Change the order of an objective:

- Click the objective icon next to the objective you would like to change the order and drag it on top of the folder icon next to the objective number you would like it to change to. For example, if you want to change Objective 3 into Objective 1, then click the folder icon next to Objective 3 and drag it on top of the folder icon next to Objective 1. This will turn Objective 3 to Objective 1 and automatically change what was previously Objective 1 into Objective 2.
- A message will come up on the screen that asks if you want to make the change. Click **"OK."**
- Use the method stated above to change the order of an appendix.

DELETE A GOAL

Steps: To delete a goal.

- Select the goal you want to delete.
- Click on the downward arrow next to the **"plan menu"** field, and then select **"Delete goal."**
- Or, click on the goal you would like to delete and drag it into the trash icon.
- A message will come up on the screen that asks if you are sure you want to delete the goal and its objectives. Note that when you delete a goal, you will automatically delete all of its objectives.
- Click **"OK."**

DELETE AN OBJECTIVE

Steps: To delete an objective.

- Select the objective you want to delete
- Click the downward arrow next to **"plan menu"** field, and then select **"Delete objective."**
- Or, click the objective you would like to delete and drag it into the trash icon.
- A message will come up on the screen that asks if you are sure you want to delete the objective.
- Click **"OK."**

Tools Available

DELETE AN APPENDIX

Steps: To delete an appendix.

- Click the downward arrow next to the "**plan menu**" field and select "**Delete appendix.**"
- Or, click the appendix you would like to delete and drag it into the trash icon.
- A message will come up on the screen that asks if you are sure you want to delete the appendix.
- Click "**OK.**"

PRINT A PLAN

Steps: To print an online plan.

- Click the downward arrow next to the "**Menu-Click here for choices**" field.
- Select "**Print the open plan.**"

DELETE A PLAN

Steps: To delete an online plan.

- You are not authorized to delete an online plan.
- Contact the system administrator.

START A PLAN

Steps: To start a plan.

- Click the downward arrow next to the "**Menu-Click here for choices**" field.
- Select "**Start a plan.**"

TIP! You <u>cannot</u> start more than one plan at a time.

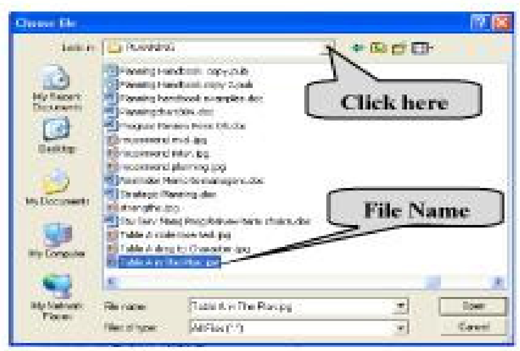
Tools Available

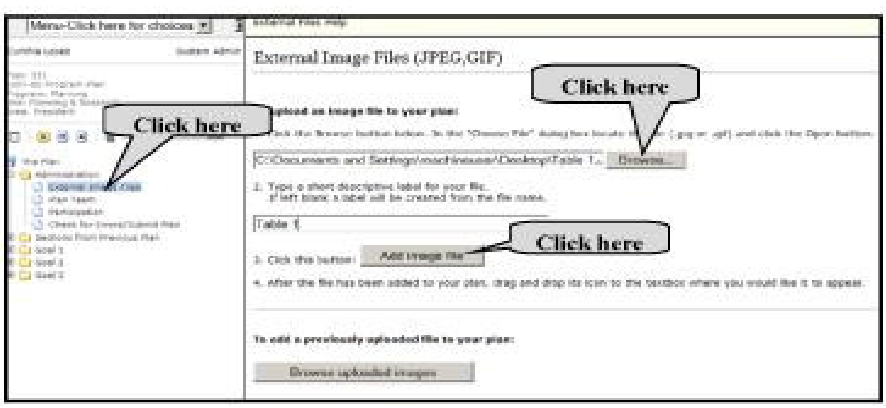
UPLOAD TABLES, CHARTS, AND/OR PICTURES

Steps: To upload your tables, charts, and/or pictures into your online plan. Note that there are two parts in uploading tables, charts, and/or pictures to your online plan. The two parts are: 1) uploading the image and 2) inserting the image.

Part 1–Uploading the Image (Tables, Charts, and/or Pictures)

- Go to your existing plan, highlight and copy your table, chart, and/or picture.
- Go to the Microsoft Paint program (click on the **"Start"** box (located on the bottom left hand corner), click on Program, then Accessories, and then Paint) and open the Paint program. Note that you may also use Photoshop.
- Click the **"Edit"** field located on your toolbar, click paste.
- Click the **"File"** field located on your toolbar, then click **"Save as, "** click the downward arrow next to the **"Save as type"** field. Scroll down until you locate **"JPEG,"** and then click on it. Name your image and save it on your computer's hard drive (preferably your desktop so you can locate it) or a disk. Give your file a name that you will remember.
- Go to your online plan.
- Click the **"Administration"** field located on the left side of the screen.
- Click the **"External Image Files"** field.
- Click the **"Browse"** box to locate your file. A **"Choose File"** message will come up, and then do the following:
  - Click the downward arrow next to the **"Look in"** field.
  - Find the drive where you saved your file and search for the name of your file.
  - Once you locate your file, click on the file. The name of your file will come up next to the **"File name"** field.
  - Click the **"Open"** box.
- For Item 2, type a short, descriptive label for your file.
- For Item 3, click the **"Add image file"** box.





Tools Available

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- Click the **"Edit"** field located on your toolbar, click paste.
- Click the **"File"** field located on your toolbar, then click **"Save as, "** click the downward arrow next to the **"Save as type"** field. Scroll down until you locate **"JPEG,"** and then click on it. Name your image and save it on your computer's hard drive (preferably your desktop so you can locate it) or a disk. Give your file a name that you will remember.
- Go to your online plan.
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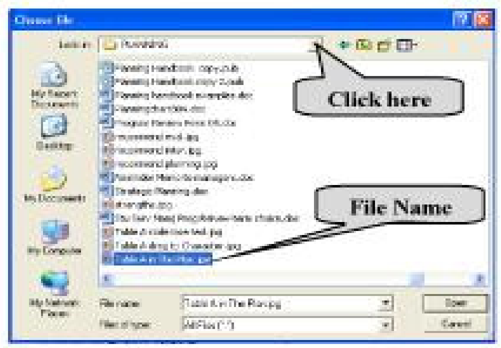
- Click the **"External Image Files"** field.
- Click the **"Browse"** box to locate your file. A **"Choose File"** message will come up, and then do the following:
  - Click the downward arrow next to the **"Look in"** field.
  - Find the drive where you saved your file and search for the name of your file.
  - Once you locate your file, click on the file. The name of your file will come up next to the **"File name"** field.
  - Click the **"Open"** box.



- For Item 2, type a short, descriptive label for your file.
- For Item 3, click the **"Add image file"** box.